



Job Aid: Requesting Quote Revisions

This Job Aid shows how to:

- Requesting quote revisions from Vendors

Of Special Note:

Revisions are available for both Formal & Informal bids but cannot be activated until the Bid Opening Date/Time has passed and the bid status is 'Opened' and quotes are being reviewed and evaluated. Remember that vendors can no longer submit new Quotes or edit the Quotes that they have already submitted in response to the Bid after the Opening date has passed. However, once a Bid has been opened, you can request clarifications, revisions and Best and Final Offers (BAFOs) via the proposal revision feature on the Revisions tab of the Bid Tabulation (Bid Tab) for that Bid.

In order to activate the Revision process the Bid owner must select which Quote/Vendor you wish to request the Revision from. The COMMBUYS system will allow the Bid owner to customize an email request, that will be sent to the vendor, notifying them of this request and also specify what additional or clarifying information will be requested on the Revised quote. The Bid owner will also assign a due date as to when the Revision must be completed by the vendor, then close the Revision request and recommence quote evaluation.

NOTE: When requesting bid revisions, departments still must follow OSD guidance for clarifications/BAFOs, etc.

Screenshot

Welcome To **COMMBUYS**

COMMBUYS
— OPERATIONAL SERVICES DIVISION —

COMMBUYS is the only official procurement record system for the Commonwealth of Massachusetts' Executive Departments. COMMBUYS offers free internet-based access to all public procurement information posted here in order to promote transparency, increase competition, and achieve best value for Massachusetts taxpayers.

COMMBUYS INFORMATION:
For more information on COMMBUYS please visit the [COMMBUYS](#) support pages.
[Training and Registration for Purchasers](#)
[Training and Registration for Sellers](#)
[Job Aids for Purchasers](#)
[Job Aids for Sellers](#)

If you have any questions or concerns contact the COMMBUYS Help Desk at COMMBUYS@state.ma.us or ring us during normal business hours (8AM – 5PM Monday – Friday) at 1-888-627-8283 or 617-720-3197.

- [Register](#)
Register here to begin using COMMBUYS.
Vendors, please read this [disclaimer](#) prior to registering.
- [Complete Registration](#)
Complete registration here to begin using COMMBUYS.
Vendors, please read this [disclaimer](#) prior to completing registration.
- [Open Bids](#)
Browse open bid opportunities.
- [Active Contracts](#)
Browse active Contracts/Blankets.
- [Contract & Bid Search](#)
Search for Bids and active Contracts/Blankets.
- [Registered Vendor Search](#)
Search for registered vendors.

Login ID:
Password:

[Forgot your password?](#)

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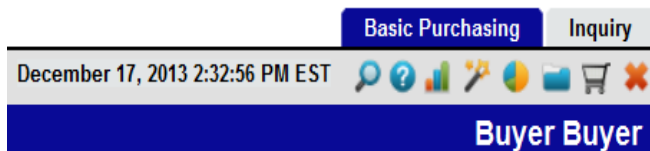
Directions

1. Launch the COMMBUYS website by entering the URL www.commbuys.com into the web browser.

Enter your Login ID and password and click the **Login** button on the COMMBUYS landing page.

Job Aid: Requesting Quote Revisions

Screenshot



Directions

2. If you have multiple roles in COMMBUYS select the Basic Purchasing role on the upper right side of the home page. If users have only one role, no user role tabs display.

3. Go to your **Control Center** to locate the opened bid. The bid must have you listed as the purchaser or you need the appropriate COMMBUYS privileges.

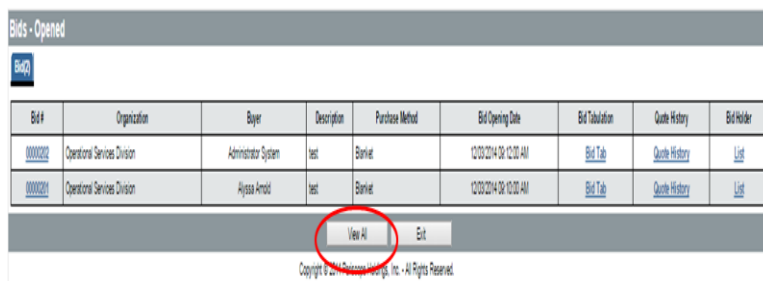
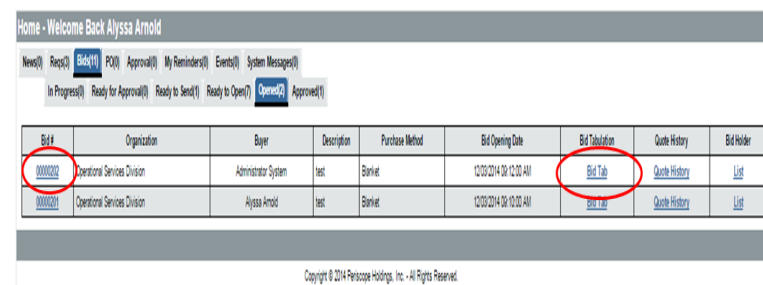
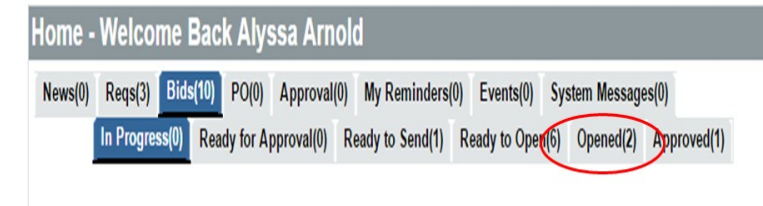
Click **Bids > Opened** and a list of available bids will display.

Note: If the bid is not opened it will still be in a Sent status. Click Open Bid at the bottom of a Sent bid to move the bid to an Opened status.

Another way to locate a bid not assigned to you and is ready for purchasing, select **Documents > Bids > Opened** from the Navigation bar. Click **View All** to view the complete list to select a bid not assigned to your user id.

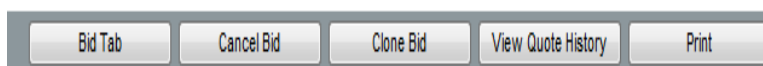
4. Bids associated to your user id display first.

Click on the **Bid #** blue hyperlink to open an approved Bid.



5. The Bid opens to the **Summary** tab.

Scroll to the bottom of the page and click the **Bid Tab** button.



Job Aid: Requesting Quote Revisions

Screenshot

Directions

Bid Tabulation for Bid #00000202

Quotes Revisions Items Header Questions Subcontractors Routing Attachments Score Summary [Back to Bid](#)

Total Number of Submitted Quotes: 4

Quote #	Description	Vendor ID	Vendor Name	Submit Date	View Quote
0000674	test	0000020	AA	12/02/2014 02:16:00 AM	View Quote
0000675	test	0000020	Consulting Group	12/02/2014 01:45:00 PM	View Quote
0000676	test	0000024	Conversion Vendor	12/02/2014 01:45:00 AM	View Quote
0000677	test	0000027	computer place	12/02/2014 01:45:00 PM	View Quote

[Create New Quote](#)

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6. The **Bid Tabulation** page displays all the Quotes received for the selected bid.

Bid Tabulation for Bid #00000202

Quotes **Revisions** Items Header Questions Subcontractors Routing Attachments Score Summary [Back to Bid](#)

Revisions [Email Communication](#)

Revision: Revision 1

Request Revision	Vendor	Quote History	Submit Date	Due Date *	Notification Actions
<input type="checkbox"/>	AA			<input type="text" value="12/02/2014 02:16:00 AM"/>	Create Notification
<input type="checkbox"/>	Consulting Group			<input type="text" value="12/02/2014 01:45:00 PM"/>	Create Notification
<input type="checkbox"/>	Conversion Vendor			<input type="text" value="12/02/2014 01:45:00 AM"/>	Create Notification
<input type="checkbox"/>	computer place			<input type="text" value="12/02/2014 01:45:00 PM"/>	Create Notification

[Send Notification to Selected Vendors](#)

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7. Click to the **Revisions** tab

To request a revision, decide which vendors you'd like to request a revision from and to determine if you would like to send multiple vendors the same revision request email, or if you will need to personalize the request email for individual vendors.

Bid Tabulation for Bid #00000202

Quotes **Revisions** Items Header Questions Subcontractors Routing Attachments Score Summary [Back to Bid](#)

Revisions [Email Communication](#)

Revision: Revision 1

Request Revision	Vendor	Quote History	Submit Date	Due Date *	Notification Actions
<input checked="" type="checkbox"/>	AA			12/05/2014 02:15:00 PM	Create Notification
<input type="checkbox"/>	Consulting Group			<input type="text" value="12/02/2014 01:45:00 PM"/>	Create Notification
<input type="checkbox"/>	Conversion Vendor			<input type="text" value="12/02/2014 01:45:00 AM"/>	Create Notification
<input type="checkbox"/>	computer place			<input type="text" value="12/02/2014 01:45:00 PM"/>	Create Notification

[Send Notification to Selected Vendors](#)

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8. To send the same request to multiple vendors, pick a **Due Date** for each revision by clicking the calendar icon, then select the check box in the **Request Revision** column for each vendor to receive the request email and click the **Send Notification to Selected Vendors** button on the bottom of the screen.

To send a revision request to one vendor, pick the **Due Date** for that vendor's revision, then click the **Create Notification** button in the **Notification Actions** column next to the vendor you'd like to request a revision from.

Note: while the revision process remains open, you will be prohibited from recommending award and the vendor can submit and withdraw their Quote as needed. They are also able to acknowledge any amendments that were applied to the Bid prior to the Bid Opening Date/Time.

Job Aid:

Requesting Quote Revisions

Screenshot

Send Quote Revision Email

Vendor Recipients: AA;

Additional Email Recipients:

From: Alyssa Arnold (alyssa.arnold@ecounture.com)

Subject:

Text:

Attachments

No Attachments

File: No file chosen

Description:

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Directions

9. Next, the **Send Quote Revision Email** screen will display enabling you to develop the email message that will be sent requesting the proposal revision(s), including adding **Additional Email Recipients**, a **Subject**, **Text** (body), and **Attachments**. Once complete, click the **Send Revision Request** button along the bottom of the screen.

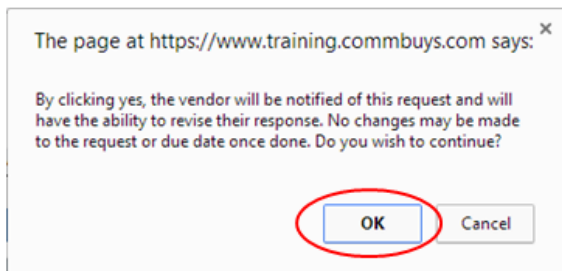
Note: the **Text** field does not support standard formatting, so it is recommended that you limit the text in this field and include any instructions in attached documents. Also note that this email will not appear in your email's Sent folder, so if you need a copy for your records, include your own email in the **Additional Email Recipients** field.

Optional instructions that could be part of the email notification sent to vendor to assist in locating and responding to revision request

1. Login to the COMMBUYS system
2. Under the "Home - Welcome Back Your Name" message, select the Quotes tab.
3. Next selection the Revision sub tab. You should see a (1) indicating the Revision is still open to you and your response is requested.
4. Select the Quote # hyperlink, which now lists an '-R1' indicating this is the first revision of your initial quote. Subsequent revision requests will change the number (R2, R3, etc...)
5. You will now be asked to confirm that this revised quote has not yet been submit, click Yes to begin editing the quote.
6. The system will display the General tab and you can begin editing the quote as needed. Please note that once all changes are made under a certain tab, you must select Save and Continue. Please complete work to all tabs (as need).
7. Once all edits have been made, move to the Summary tab for review.
8. Once review is completed, select Submit Quote at the bottom of the Summary tab. The system will ask that you confirm your intent to submit the quote.
9. You will then receive an email confirmation that the Quote has been submitted.

Job Aid: Requesting Quote Revisions

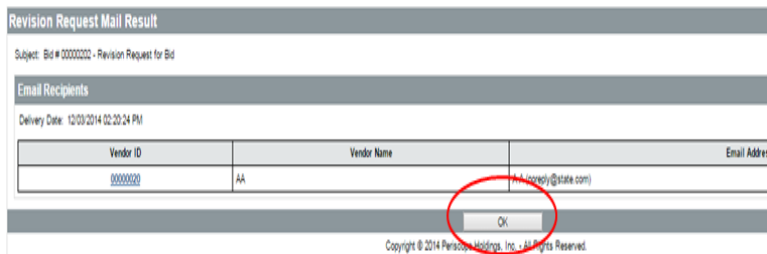
Screenshot



Directions

10. A pop-up message will display confirming your intent to make vendors' Quotes editable and to send the email.

11. Click **OK** to send the email to the selected vendor.



12. The Revision tab of the Bid will now display showing the revision request was sent.

IMPORTANT

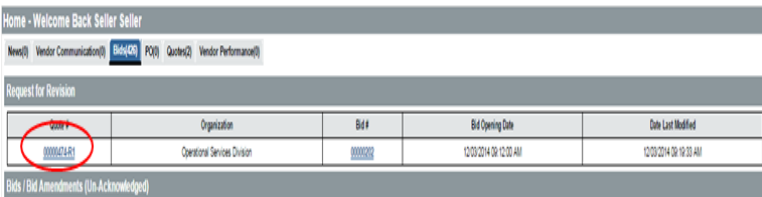
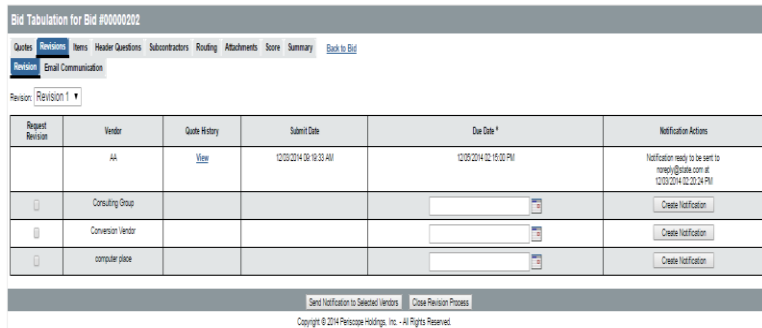
Do not select Close Revision Process until

- the selected due date has passed
- you have confirmation that the revised quotes have been submitted
- a decision to end the revision opportunity has been made

13. **NOTE:** This is what the Vendor sees.

Vendors will be able to access their editable Quote from the **Request for Revision** section on the Bids tab of their Homepage.

Upon selecting the link in the **Quote #** field, all fields will be open for editing, allowing the vendor to change all aspects of their Quote, including their item price quotes, question/answers, Terms & Conditions response and exceptions, and attachments. After completing the editing process, the vendor can submit their revision by clicking **Submit Quote** from the Summary tab. Revisions can be submitted and withdrawn as desired by the vendor until you choose to close this revision round.





OPERATIONAL SERVICES DIVISION

Job Aid: Requesting Quote Revisions

Screenshot

Directions

14. Once you are ready to review the revised Quotes, return to the Revision tab on the Bid Tab of your Bid and click the **Close Revision Process** button on the bottom of the screen. If a revision was submitted by a vendor that revised Quote will replace their original on the Bid Tab.

15. Click **View** in the Quote History column to see the original and revision.

16. The revised quote has a new number with an R1 (revision 1), and it has replaced the original quote.

However if you needed to access information on the original quote you can click on the first **Quote #**.

17. You are now able to continue with evaluation and award.

Use the **Score and Award a Bid** job aid to complete this process.

Job Aid: Requesting Quote Revisions

Screenshot

Bid Tabulation for Bid #0000202

Quote Revisions Items Header Questions Subcontractors Routing Attachments Score Summary [Back to Bid](#)

Revision: Revision 2

Request Revision	Vendor	Quote History	Submit Date	Due Date *	Notification Actions
<input type="checkbox"/>	AA			<input type="text" value=""/>	Create Notification
<input type="checkbox"/>	Consulting Group			<input type="text" value=""/>	Create Notification
<input type="checkbox"/>	Conversion Vendor			<input type="text" value=""/>	Create Notification
<input type="checkbox"/>	computer place			<input type="text" value=""/>	Create Notification

[Send Notification to Selected Vendors](#)

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Directions

18. If needed you can conduct another revision round by selecting the next round in the **Revision** dropdown and then starting the request process again.

The revision drop down now displays **Revision 2**

COMMBUYS Job Aids



Find Your COMMBUYS Community

- Commonwealth Agencies
- Local Governments and Non-Profits
- Suppliers
- Liaisons and Change Agents

Key Resources

[How to Contact Us](#)



OSD is excited to share with you the COMMBUYS Job Aids page. All job aids will be available on this page, please bookmark for future reference. Here you will find resources designed to assist you in the use of COMMBUYS. We will continue to post additional job aids as they are scheduled through the month of June and ongoing.

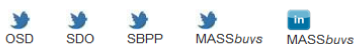
Job Aids for Purchaser

The COMMBUYS Purchaser page provides job aids for the Purchaser Community.

Job Aids for Seller

The COMMBUYS Seller page provides job aids for the Seller Community.

Connect with us online



Additional job aids can be found online in the COMMBUYS Resource Center.

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 Select the [COMMBUYS Job Aids](#) link
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